



Nonprofit Partner Portal User's Manual

Website: www.BloomingtonVolunteerNetwork.org

Username: _____

Password: _____



Online help: partners.handsonconnect.org

Who Is My Primary Contact for Technical Support?

Lucy Schaich

schaichl@bloomington.in.gov

(812) 349-3433

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Welcome to the Nonprofit Portal Training Manual!

We have designed this guide to help walk you through the Partner Portal and everything you'll need to know to successfully submit, edit, and manage your volunteer opportunities through the new Volunteer Network HandsOn Connect (HOC) system. There are many exciting features available in this system which we hope you'll explore – everything from adding custom questions for volunteers to answer upon registration to back-end management of volunteer interest inquiries to tracking volunteers' follow-through.

This guide is meant to be a helpful resource to be referred to whenever necessary. Please feel free to reach out to us directly if you have questions that are not answered within the pages of this guide. That's what we're here for!

~ City of Bloomington Volunteer Network

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Helpful HandsOn Connect Vocabulary

- **City of Bloomington Volunteer Network Web Page** = The Volunteer Network's page on the City of Bloomington's website. www.bloomington.in.gov/volunteer
- **Public or Volunteer Portal** = The public webpage that anyone can view without logging in. This is where you will log in to your account. www.bloomingtonvolunteernetwork.org
- **Partners** = Nonprofit partner agencies and staff.
- **Partner Portal** = The interface through Hands On Connect that Partner staff use to update and enter their information and opportunities.
- **Opportunity** = Includes the title, description and type of the volunteer task. Every Opportunity has at least one (1) Occurrence.
- **Occurrence** = The scheduled date/s and time/s for an opportunity
- **Connection** = Volunteer inquiries about your Opportunity's Occurrences
- **Connection Grid** = An area on the occurrence record where you can manage volunteer connections and approvals

Nonprofit Partner Portal Registration:

Once you have been approved as a Partner Portal User for your organization, you will receive an email to let you know that your User Account has been created. It will include your login and password information, which you can use to login to the Partner Portal.

If you don't already have profile on the Volunteer Network website, you will first need to create one (just like a volunteer would). The initial username and password that will be sent to you upon registration will allow access to the front-end of the website only. Please contact Lucy to request Partner Portal access once you have registered.

Logging in to the Partner Portal:

Once you have your username and password, go to the Volunteer Network homepage (www.bloomingtonvolunteernetwork.org) and click on the blue "**LOGIN**" button in the upper right-hand corner of the screen. Your username is by default the email address associated with your Volunteer Network HOC account.



1. When prompted, enter your Username (by default, the email associated with your Volunteer Network HOC account) and Password. Then click **LOGIN**.

NOTE: If you have forgotten your password, click on **"Forgot password?"** (just above the password box) to have your password reset via email. When you sign in, you will be asked to choose a new password.

2. If you have Partner Portal access, you will likely be automatically directed to the Partner Portal (the administrative side of the website) upon logging in, where you will be able to manage your organization's volunteer opportunities and update your organization information (primary contacts only).

Please don't share your username and password with other people at your organization. If someone else at your organization needs access to the system, we can grant them access as well.

The Partner Portal Visual Overview:

Welcome to the Bloomington Volunteer Network Partner Portal!

UPDATES:

- ▶ [REGISTER HERE](#) for Partner Organization Training for Online Recruitment and HandsOn Connect.
- ▶ **ATTENTION:** This System DOES NOT support the web browser Internet Explorer (IE). Please use [Mozilla Firefox](#), [Google Chrome](#), or [Safari](#) when logged in to get full fun

The Basics of the New Volunteer Network

- 1. Update Your Organization Profile**

Click on the "My Organization" tab above to view how your organization is presented and update organization information. Add new organizational contacts via this tab. For additional help, click [here](#).
- 2. Enter a New Opportunity**

Follow these steps to enter an opportunity:

 1. **ENTER** your opportunity using the [Create Volunteer Opportunity link](#) (or click the link on the menu to the left) You will be prompted to include your opportunity name, desc
 2. **FORMAT** your opportunity description by clicking on the "edit/update description" link if you want to add additional text formatting or images to your opportunity. Need an image URL? Get one free here: <http://postimage.org>.

For additional help, click [here](#).
- 3. Update an Existing Opportunity**

To edit an existing volunteer opportunity, click on the "Volunteer Opportunities" tab above. If you're changing the date and/or location of an activity, please click [here](#) for instruct
- 4. Manage Your Volunteers**

Volunteers are always managed through the Occurrence record. Once you have created your opportunity, you can manage the sign-ups by doing the following:

 1. Click on the "Volunteer Opportunities" tab above
 2. Click on the name of the volunteer opportunity you want to manage
 3. Scroll down to the Occurrences heading and click on the Occurrence ID
 4. Once in the Occurrence record, you can view all of the volunteers who have signed up for the opportunity or shift, print check-in sheets, and report attendance. The Conne

The check-in sheet can also be found near the top of the Occurrence screen (click "Volunteer Opportunities" tab, click opportunity, then Occurrence ID)

For additional help on this section, view the [Partner Portal Searchable Help](#).

The Home screen – The Partner Portal Home Page is the first screen you'll see when you log in. This area, along with the "Partner Resources" section (on the left side of the screen below the search box), is where we will post announcements, links, documents, and other information that will be useful to our nonprofit partners. Please skim both of these sections each time you log in to see if we've posted new information.

Vertical Menu Options:

1. **Create Volunteer Opportunity Link** – This is what you will click to create a new volunteer opportunity.
2. **Quick Links** – This contains links to pending Connections and Hours verification.
3. **Partner Resources** – From training manuals to tips on leading volunteer reflections, keep an eye on this area for all sorts of important documents and helpful resources.
4. **Volunteer VIP Resources** – This contains materials and resources connected with VIP information and network sessions. You can read more about previous and upcoming VIP sessions on the website under For Nonprofits – Resources.
5. **Search** – This is a quick way to search for opportunities, connections, locations, etc.



Horizontal Tabs:

1. **The Home screen** – This is where the Nonprofit Partner Resource Center resides. We will update this landing page with the latest Partner resources for your benefit! Please give it a glance every time you sign in to see check for important updates and announcements.
2. **My Organization** – This tab lists the account information for your organization. It includes basic information like your mission statement and website which show up in your Organization Profile on the public site, as well as the primary contact information associated with the account.
3. **Locations** – Every organization has at least one (and often more) locations associated with the volunteer opportunities it posts. Each location is listed in its own record, and includes pertinent information like parking, entrance, and public transit directions, as well as an automated link to Google maps. Location records can be linked to multiple Volunteer Opportunities and Occurrences.
4. **Volunteer Opportunities** – Here, you'll find the Volunteer Opportunities submitted and managed by your organization. Volunteer Opportunity Records contain the overarching information about a volunteer opportunity, such as description, search criteria, restrictions (e.g. age), and more. You can use the "View" dropdown menu to choose which groups of opportunities you'd like to see (e.g. just opportunities "pending approval").
5. **Connections** – The Connections tab lists volunteer "Connection" records, which represent volunteer sign-ups or volunteer referrals (e.g. a single Connection record would capture the fact that Joe Smith expressed interest in the "Afterschool Tutor"

volunteer opportunity on a given date). This can be a useful place to see whether any volunteer connections remain un-verified.

6. **Reports** – This feature allows us to build custom reports for you, so you can easily access useful lists of information – e.g. volunteer answers to custom questions, project feedback, and more.
7. **Switch to Volunteer Portal tab** – Click here to go to the public website (e.g. if you wanted to sign up to volunteer for a project, or check to see what your opportunities look like on the front end of the website).
8. **Partner Portal Help** – Click here for additional searchable help topics about using the Partner Portal.

Updating Your Organization's Information *(available to Primary Contact only)*

Click on the **My Organizations** Tab at the top of the partner portal window. You should see your organization's account profile. Click on **Edit** to make any changes or updates to the profile.

Please note, only the Primary Contact listed for an organization will be able to make global edits to the account, such as web address, mission statement, impact area, organization contact information, and more. If you are not listed as the primary contact, you can visit this page, but you will only be able to manage your own password information through the "Edit" screen.

If you feel like the primary contact for the account should be changed to you and/or you see information that needs to be changed which you don't have access to, please contact us to discuss the appropriate updates.

The screenshot displays the 'My Organization' page in the Partner Portal. The top navigation bar includes links for Home, My Organization (highlighted), Locations, Volunteer Opportunities, Occurrences, Connections, Reports, Switch to Volunteer Portal, and Partner Portal Help. The left sidebar contains sections for Partner Staff Portal, Create Volunteer Opportunity, Quick Links, Partner Resources, and Volunteer VIP Resources. The main content area shows the organization's profile for 'Teachers Warehouse'. A red arrow points to the 'Edit' button in the top right corner of the profile section. The profile is divided into several sections: Basic Info, Organization Contact Info, Primary Contact Info, Default Opportunity Coordinator, Change Password, and Describe Your Needs. Each section contains fields for various details, some of which are editable.

Basic Info	
Organization Name	Teachers Warehouse
Website	http://www.bloomingtonrotary.org/about-924teachers-warehouse/
Mission Statement	Receives product donations from businesses and individuals and places them in a setting
Primary Population Served	Other
Primary Impact Area	Schools
Federal EIN	
LOGO	View

Organization Contact Info	
Street	524 N. Fairview St.
State	IN
Main Phone	(812) 929-7522

Primary Contact Info	
First Name	Martha
Last Name	Hilderbrand
Title	
Email	martha.hilderbrand@gmail.com

Default Opportunity Coordinator	
First Name	Martha
Last Name	Hilderbrand
Email	martha.hilderbrand@gmail.com

Change Password	
Username	martha.hilderbrand@gmail.com

Describe Your Needs	
Description	Hours are: Monday thru Thursday 3:30 p.m. to 6:00 p.m. Saturday 9:30 a.m. to 12:30 p.m.

Reviewing Your Organization's Volunteer Opportunities

To review all of the Volunteer Opportunities your organization has posted:

1. Click on the **Volunteer Opportunities** tab in the horizontal menu bar. Once there, a list of recently viewed Volunteer Opportunities will appear (recently viewed items include anything you've looked at in the Partner Portal OR on the public Volunteer Network website, regardless of whether they were posted by your organization).
2. Select **All Volunteer Opportunities** from the dropdown **View** menu and click **Go** to see a list of all of the Volunteer Opportunities your organization has posted.

Volunteer Opportunities Home

View: All Volunteer Opportunities Go!

Recent Volunteer Opportunities [Create New Volunteer Opportunity](#)

Volunteer Opportunity Name	Default Location	Type	Registration Type	Schedule Type	Start Date	End Date	Status
Fill the Volunteer Gap this Summer! (ell if)	401 N. Morton St., Ste. 260	Project	Express Interest	To Be Scheduled	5/9/2012	8/15/2012	Inactive

In the list overview, you can find useful information such as the default location, the registration and schedule types, and the status of the Volunteer Opportunity. Note that the **Start & End Dates** listed usually refer to the recruitment window for the opportunity. Opportunity **Status** designations include:

Pending = Posting is still in progress (you have not submitted it for approval).

Awaiting Approval = Posting has been submitted & is awaiting approval from Volunteer Network staff.

Active = Posting has been approved by Volunteer Network staff. Note that this may not mean posting is live on the website. It must have an associated Occurrence with Active Status as well.

Click on the **Volunteer Opportunity Name** to view a particular Volunteer Opportunity Record.

To determine which of your opportunities are actually LIVE on the website, the easiest way to do this is through the public website. Click on the **Switch to Volunteer Portal** tab to go the public website and click on **Browse Organizations** in the horizontal menu bar under "For Volunteers."

Find your Organization in the list and click on its name to view your Organization Profile. On the right-hand side of your profile, find and click on the green link that says **See All Volunteer Opportunities with this Partner Organization**. You will be taken to a Search Results page that lists all Volunteer Opportunities that are currently active on the site for your organization.

Organization Profile

City of Bloomington Parks and Recreation Dept.

<http://www.bloomington.in.gov/parks>

The City of Bloomington Parks and Recreation Department volunteers provide valuable services to the community by assisting in various programs and projects in a variety of ways. Volunteers can be assigned to projects on a regular basis or on occasion as desired. There are many opportunities to choose from and an assortment of times and days available. Volunteer opportunities exist in the following areas: 1. Adult Sports 2. Class Instructors 3. Clerical Services 4. Community Events 5. Cultural Arts 6. Farmers' Market 7. Environmental Efforts 8. Park Projects 9. Research/Surveys 10. Senior Citizen Programming 11. Inclusion Programs 12. Youth Sports 13. Youth Programs



See All Volunteer Opportunities With this Partner Organization

IMPACT AREA(S)
Sports & Recreation

POPULATION(S)
SERVED
Other

ADDRESS
Main Parks Office,
Bloomington, IN,
47402

Overview of the Types of Volunteer Opportunity Postings

Currently, the Volunteer Network provides two different “posting types” for volunteer opportunities. When you submit your volunteer opportunities through the Partner Portal, you will need to choose a “Schedule Type” to confirm how you would like the opportunity to be posted on the Volunteer Network website. Use the chart below to guide your choice.

Posting Type:	Schedule Type:
<p>Appear on the Calendar and are Date & Time Specific</p> <p>Calendared Opportunities are “done-in-a-day”, or “sign-up-and-show-up”, date-and-time specific opportunities that are managed by you, our nonprofit partners.</p> <p>Volunteers can “EXPRESS INTEREST” in these opportunities with a click of a button and will require follow-up and confirmation from someone at your organization.</p> <p>Volunteers can also “SIGN UP” allowing the volunteer to fully register for the opportunity through the website.</p>	<p>Date & Time Specific</p>
<p>Ongoing Recruitment Opportunities</p> <p>This type of volunteer posting is appropriate for longer-term or skills-based volunteer opportunities that typically require commitment beyond a single done-in-a-day shift.</p> <p>Volunteers “EXPRESS INTEREST” in these opportunities and will require follow-up and confirmation from someone at your organization.</p>	<p>Ongoing Recruitment</p>

How to Submit a New Volunteer Opportunity: Using the Create Volunteer Opportunity Link

Creating a new Volunteer Opportunity is very easy with the **Create Volunteer Opportunity Link**. After logging into your account simply click the Create Volunteer Opportunity link in the text or on the left hand side of the screen.

Home

My Organization

Locations

Volunteer Opportunities

Occurrences


Connections

Reports

Switch to Volunteer Portal

Partner Portal Help

Partner Staff Portal



Partner Portal

Create Volunteer Opportunity

- Create Volunteer Opportunity

Quick Links

- Connections Awaiting Approval
- Self Reported Hours Pending Approval

Partner Resources

- Understanding Volunteer Planning

Welcome to the Bloomington Volunteer Network Partner Portal!

UPDATES:

- ▶ [REGISTER HERE](#) for Partner Organization Training for Online Recruitment and HandsOn Connect.
- ▶ **ATTENTION:** This System DOES NOT support the web browser Internet Explorer (IE). Please use [Mozilla Firefox](#), [Google](#)

[The Basics of the New Volunteer Network](#)

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2. Enter a New Opportunity

Follow these steps to enter an opportunity:

1. **ENTER** your opportunity using the [Create Volunteer Opportunity link](#) (or click the link on the menu to the left). You will be
2. **FORMAT** your opportunity description by clicking on the "edit/update description" link if you want to add additional text. Need an image URL? Get one free here: <http://postimage.org>.

For additional help, click [here](#).

Once you click on the Create Volunteer Opportunity Link, a dialogue box will appear.

Home

My Organization

Locations

Volunteer Opportunities

Occurrences


Connections

Reports

Switch to Volunteer Portal

Partner Portal Help

Partner Staff Portal



Partner Portal

Create Volunteer Opportunity

- Create Volunteer Opportunity

Quick Links

- Connections Awaiting Approval
- Self Reported Hours Pending Approval

Partner Resources

- Understanding Volunteer Planning

Volunteer VP Resources

- Volunteer Engagement
- Payroll July 2012

Volunteer Opportunity Name

Make sure to provide a good description to your volunteers that includes the activities that they can expect to accomplish.

Volunteer Opportunity Description

Opportunity Coordinator

Location

Primary Impact Area

Populations Served

Type

Disaster Opportunity Type

Minimum Age

Minimum Age (w/ adult)

Schedule Type

Good for Groups

Court Ordered Allowed

NBHM/Member

Local Impact Area

Martha Hilderbrand

524 North Fairview Street

Adult Education

Available
Animals
Families
Homeless
Immigrants, Refugees or Ethnic Groups
LGBT (Lesbian, Gay, Bisexual, Transgender)

Chosen

☒ Volunteer Opportunity
☐ Training or Orientation

☐ Emergency Preparedness
☐ Disaster Response & Recovery
☒ Not Disaster Related

18

18

☐ Date-Specific (on calendar)
☒ Ongoing Recruitment (not on calendar)

☐ Good for Groups
☐ Court Ordered Allowed
☐ NBHM/Member

Available
Age 55+ Services
Animal-Related
Arts, Culture & Humanities
Board of Directors
Childcare

Chosen

Select up to 3 preferred dates for this opportunity to be featured in the Weekly Volunteer Update (pub. every Weds. in the HT & promoted via local media & email). Dates are not guaranteed, but we will do our best to accommodate your request. Agencies are limited to one appearance per 4-6 weeks.

Select 1 Date to appear in Weekly Update

Available
Jul 1 (before Jun 26)
Jul 8 (before Jul 3)
Jul 15 (before Jul 10)
Jul 22 (before Jul 17)
Jul 29 (before Jul 24)

Chosen

Complete all of the fields as required and click 'next'. The form will generate the next questions based on the type of Volunteer Opportunity you are creating.

9

Enter a **Volunteer Opportunity Name**.

Select the **Primary Impact Area** that is as relevant as possible. There may not be an exact match.

Select a **Location**. If this is a new location, select **Create Location** and enter that information first.

There are two options for **Type**;

1. **VOLUNTEER OPPORTUNITY** for opportunities that a volunteer can sign up for or express interest in.
2. **TRAINING or ORIENTATION** for new volunteer trainings and orientations

There are two options for **Schedule Type**;

1. **DATE & TIME SPECIFIC** projects show up on the Volunteer Calendar.
2. **ONGOING RECRUITMENT** projects show up in the searchable Volunteer Opportunity Database.

If this is a **Date & Time Specific** Volunteer Opportunity you will also have to select one of two options for **Registration Type**;

1. **EXPRESS INTEREST** opportunities allow the volunteer to express interest through our site. You will receive an email with their contact information and it is up to you to follow up with this volunteer. This can be useful if you are screening applicants or need to set up a volunteer schedule with this individual.
2. **SIGN UP** opportunities allow the volunteer to fully register for the project through our site.

If this is an **Ongoing Recruitment Opportunity**, you will need to pick a **Start Date** and **End Date**.

This is not asking when the project itself will start and end, it is asking you what the recruiting dates are for this project.

The Start Date refers to the date you want to start recruiting for the volunteer opportunity, and the End Date is the date after which the opportunity is no longer visible to potential volunteers on the public website.

Get Featured! Select your preferred dates for including this listing in the VolunteerBloomington! Weekly email and media blast. Select up to 3 preferences for weeks you would like this listing featured. Please notice that feature weeks must be selected prior to the Friday before to be eligible for inclusion.

After you have finished the entire form, you can click **Finish**.

After you have completed this form – you have the option of formatting your opportunity description.

Format Your Description

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

<input checked="" type="checkbox"/> Opportunity Created	<input type="checkbox"/> Opportunity Description Add/Change Description
<input checked="" type="checkbox"/> Occurrence Created Create New Occurrence	<input checked="" type="checkbox"/> Opportunity Characteristics (Optional – Improves Search and Metrics)
<input type="checkbox"/> Recurrence Created Create New Recurrence	<input type="checkbox"/> Opportunity Published (Status: Pending) Publish
	<input type="checkbox"/> Verifications Complete

Total Active Occurrences: 1 Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

At the top of the Volunteer Opportunity Detail Page page will be a tan box that shows all the steps that you have completed and which steps still need to be finished. To add a photo or format the text, click on the **Add/Change Description** link in the volunteer opportunity record.

Static Page Editor

Save Close

Source

Come Volunteer With Us!
All hands are needed on the trail on **Saturday, October 13** as members of the Bloomington Trail Club and volunteers from throughout the county works to make our trails the best they can be. We will be mulching rain or shine! Dress for the weather and come to have fun and get things done!
Groups are welcome. Sign up below by yourself or with a team. **No experience is necessary.**

This will open the editor for your Project Description. You can add text, links, pictures and logos (You will need a URL for any photos or images placed in your listing). You can also change the color of text or make certain words bold in order to draw more attention to application deadlines or special requirements. Once completed, click **Save**, then **Close**.

After this window closes, you may notice that Opportunity Description is not checked yet; you can **Refresh** your browser window and it will now show as checked.

How to Add an Image to your Description

You will need a URL (internet address) for any image that you would like to include in your online description. Need an image URL? Get one free here: <http://postimage.org>.

Static Page Editor

Save Close

Source

Salsa Contest
Saturday, August 29
Summer's sun is still blazing, and we're Bloomington's 27th annual salsa contest! Homemade salsa will be evaluated, and take part in the food showdown of the of locally-grown ingredients and the culinary craze.

Duties: Take part in the hottest Parks and Recreation volunteers dish out samples and keep chips platter.

Program Time: 8:15 a.m.-1 p.m.

Training: Volunteers will be trained at the beginning.

Location: Showers Plaza, 401 N. Morton St.

Age of Volunteers: 16 yrs. and up

Number of Volunteers: 6-8

CLICK HERE TO SIGN UP TO VOLUNTEER

Image Properties

Image Info

URL: <http://bloomington.in.gov/media/media/image/jpeg/medium/3> [Browse Docs](#)

Alternative Text:

Width: 48 Height: 93

Border: HSpace: 5 VSpace: Align: Left

Preview: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas feugiat consequat diam. Maecenas metus. Vivamus diam purus, cursus a, commodo non, facilisis vitae,

OK Cancel

Create a New Occurrence

When you enter a new opportunity using the Create Volunteer Opportunity Link, your occurrence will be created for you.

If this project is Date-Specific and you want to add additional occurrences after exiting the Create Volunteer Opportunity Link ~or~ you are updating an existing Date-Specific or Ongoing opportunity, you can manually create additional occurrences by clicking the link **Create New Recurrence** and following the prompts.

Occurrences			
New Occurrence			
Action	Occurrence ID	Start Date & Time	End Date & Time
Edit	OC-002772	11/21/2014 2:00 PM	11/21/2014 4:00 PM
Edit	OC-002144	9/1/2014 9:00 AM	9/1/2014 1:00 PM
Edit	OC-002341	8/25/2014 10:00 AM	8/25/2014 1:00 PM

Preview your listing online

Click the link for the **Occurrence URL** to preview your listing. This link is located in the Occurrence section, just below your Volunteer Opportunity information.

Occurrences							
New Occurrence							
Action	Status	Occurrence ID	Start Date & Time	End Date & Time	Total Connections	Total Pending	Occurrence URL
Edit	Active	OC-006446	8/29/2015 8:15 AM	8/29/2015 1:00 PM	0	0	http://www.bloomingtonvolunteernetwork.org/HOC...
Edit	Active	OC-002309	8/25/2012 8:30 AM	8/25/2012 12:30 PM	1	1	http://www.bloomingtonvolunteernetwork.org/HOC...

Your opportunity will not be posted until Volunteer Network staff have reviewed and approved it for publication. Please allow 24-48 hours for this to happen.

Opportunity Details

Trail Mulch-A-Thon

City of Bloomington Volunteer Network
<http://www.bloomington.in.gov/volunteer>



Come Volunteer With Us!

All hands are needed on the trail on **Saturday, October 13** as members of the Bloomington Trail Club and volunteers from throughout the county works to make our trails the best they can be. We will be mulching rain or shine! Dress for the weather and come to have fun and get things done!

Groups are welcome. Sign up below by yourself or with a team. **No experience is necessary.**

SHARE

SIGN UP

Saturday, October 13, 2012 8:00 AM-1:00 PM

LOCATION: Bloomington, IN 47404

EVENT: **N/A**

VOLUNTEER LIMIT: 100 | SPOTS REMAINING: 100

OPPORTUNITY LEADER: Lucy Schaich [EMAIL](#)

Full opportunity address and directions will be sent to you by e-mail after you sign up.

SIGN UP

Or sign up with a team. ?

Editing and Updating a Volunteer Opportunity

Volunteer Opportunities Occurrences Connections Reports Switch to Volunteer Portal Partner Portal Help

All Volunteer Opportunities

View: All Volunteer Opportunities

Admin	Volunteer Opportunity Name	Default Location	Type	Registration Type	Schedule Type	Start Date	End Date
Edit	Community Garden Fall Clean Up - SAMPLE DO NOT REGISTER	Showers Plaza	Project	Express Interest	Date & Time Specific	9/1/2014	11/21/2014
Edit	Community Volunteer Fair at Farmers' Market (elliff)	401 N. Morton St., Ste. 260	Project	Express Interest	To Be Scheduled	8/18/2011	8/18/2012

Click on the **Volunteer Opportunities** tab and then the name of the Volunteer Opportunity you want to edit.

Volunteer Opportunity
Community Garden Fall Clean Up - SAMPLE DO NOT REGISTER
[Back to List: Volunteer Opportunities](#)

Volunteer Opportunity Detail [Edit](#)

HandsOn Connect Shortcuts

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created [Create New Occurrence](#)
- Recurrence Created [Create New Recurrence](#)
- ✓ Opportunity Description [Add/Change Description](#)
- ✓ Opportunity Characteristics (Optional – Improves Search and Metrics)
- ✓ Opportunity Published (Status: Active)
- Verifications Complete

Total Active Occurrences: 2
Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

Total Verifications Due: 0

You can now edit any of the information that you entered when the project was created. You can do this two ways. You can click **Edit** at the top of the page, make the changes and then click **Save** or just change it directly on this page and click **Save**.

If you need to edit the project description, click the **Change Description** link under the yellow box. Make your changes, then click **Save** and then **Close**.

If you do need to edit the project, you will now be forced to select a **Primary Impact Area**, **Genders Served**, & **Age Groups Served** before you can save your edits.

Search Characteristics

Primary Impact Area: Environment

Secondary Impact Area: --None--

Genders Served: All Genders Served

Age Groups Served: Available: Children & Youth (under 18), Seniors (over 65), All ages; Chosen: Adult (18-65)

Adding Project Occurrences

Ongoing Recruitment opportunities have only one occurrence indicating a recruitment time period.

Date & Time Specific opportunities may have multiple occurrences for multiple shifts or dates.

If the project is **Date & Time Specific** and you need to add additional dates, click on the **Volunteer Opportunities** tab and then the name of the Volunteer Opportunity you want to add occurrences to.

Volunteer Opportunities Occurrences Connections Reports Switch to Volunteer Portal Partner Portal Help

All Volunteer Opportunities

View: All Volunteer Opportunities

A B C D E F G

Action	Volunteer Opportunity Name	Default Location	Type	Registration Type	Schedule Type	Start Date	End Date
Edit	Volunteer Fair Setup	Showers Plaza	Volunteer Opportunity	Express Interest	Date & Time Specific (on calendar)	8/18/2012	8/18/2012

In the yellow box, click the **Create New Occurrence** link.

Volunteer Opportunity Detail Edit Add Question

HandsOn Connect Shortcuts

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

<input checked="" type="checkbox"/> Opportunity Created	<input checked="" type="checkbox"/> Opportunity Description Add/Change Description
<input type="checkbox"/> Occurrence Created Create New Occurrence	<input checked="" type="checkbox"/> Opportunity Characteristics (Optional - Improves Search and Metrics)
<input type="checkbox"/> Recurrence Created Create New Recurrence	<input type="checkbox"/> Opportunity Published (Status: Inactive)
	<input type="checkbox"/> Verifications Complete

Total Active Occurrences: 0 Total Verifications Due: 0

Complete the top portion of the Occurrence page. Both the location and contact for this occurrence will default to the location and contact selected for the parent opportunity. You do not need to complete these fields unless there is a different location or contact for this occurrence.

Occurrence Edit New Occurrence

Occurrence Edit Save Save & New Cancel

Required Information

Volunteer Opportunity	Volunteer Fair Setup	
Location	Showers Plaza	
Start Date & Time	8/24/2013 7:00 AM	[11/12/2013 5:21 PM]
End Date & Time	8/24/2013 8:30 AM	[11/12/2013 5:21 PM]

Update all connections when editing Date & Time Specific occurrences (not TBS)

Status Active

Posting Status

Update all the existing connections? No

Adding Project Recurrences

If you have multiple occurrences that happen on a regular basis at the same time or day of the month, creating a recurrence may be a helpful and efficient way to enter those.

Volunteer Opportunity
Volunteer Fair Setup
◀ [Back to List: Volunteer Opportunities](#)

Volunteer Opportunity Detail [Edit](#) [Add Question](#)

HandsOn Connect Shortcuts

Volunteer Opportunity Overview

Here's your at-a-glance view of this Volunteer Opportunity:

<input checked="" type="checkbox"/> Opportunity Created	<input checked="" type="checkbox"/> Opportunity Description Add/Change Description
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	<input type="checkbox"/> Verifications Complete

Total Active Occurrences: 0 Total Verifications Due: 0

Follow the prompts to complete the recurrence page with the relevant pattern of your opportunity's repeating: Daily, Weekly, Monthly, etc.

Recurrence
New Recurrence

Recurrence Edit [Save](#) [Cancel](#)

Occurrence Information ! = Required Information

Volunteer Opportunity [Search](#) Status

Coordinator information

Opportunity Coordinator [Search](#) Opportunity Coordinator Email

Time/Date Information

Start Date [11/12/2013] End Date [11/12/2013]
Start Time End Time

Recurrence Type ! = Required Information

Recurrence Type Weekly Recurrence Type

Days of Week

When you click Save, you will have created a series of occurrences that follow a pattern. You can then edit those occurrences separately if needed. They all refer back to the opportunity listing – so be careful to keep that listing description up to date.

Deactivating Volunteer Opportunities

If you need to remove a Volunteer Opportunity from the Searchable Database or Project Calendar, click on **Volunteer Opportunities** and click on the name of the Volunteer Opportunity you would like to remove from the public website.

PLEASE NOTE: *No opportunity may be deleted from your list of opportunities. All opportunities will remain in your listing on the Partner Portal as an archive, but they can be removed from the public website to discontinue recruitment.*

Deactivating Ongoing Recruitment Volunteer Opportunities

To deactivate an **Ongoing Recruitment** type of volunteer opportunity, simply edit the opportunity to change the **End Date** to a date in the past.

To re-activate the opportunity, edit the opportunity again to change the **End Date** to a date in the future. Be sure to update the opportunity description as well when re-activating an archived opportunity.

Deactivating Date & Time Specific Volunteer Opportunities

To deactivate a **Date & Time Specific** type of volunteer opportunity, scroll down to the Occurrences section of the page and click on the Occurrence ID that you want to deactivate. Editing the Occurrence **End Date** to a date in the past will deactivate that opportunity from the live listings.

To re-activate the opportunity, simply add a new occurrence to the opportunity with a date that ends in the future.

Deleting the entire Volunteer Opportunity is not possible, and would not be advisable as it will create orphaned records for any volunteer who may have connected with your opportunity.

Managing Volunteers

Once you have created your opportunity, there are several ways to access your volunteer sign up information to approve participation, verify hours, print check in sheets and mark attendance.

Home My Organization Locations Volunteer Opportunities Occurrences Connections Reports Partner Portal Help Switch to Volunteer Portal

Welcome to the Bloomington Volunteer Network Partner Portal!

UPDATES:

- ► **REGISTER NOW** for Partner Organization Training on HandsOn Connect. Training continues through August 2012.

The Basics of the New Volunteer Network

- 1. Update Your Organization Profile**
Click on the "My Organization" tab above to view how your organization is presented and update organization information. For additional help, click [here](#).
- 2. Enter a New Opportunity**
Click on the link for the [Volunteer Opportunity Wizard](#) (or click the menu to the left) which will guide you through the process opportunity information, make sure you enter a description of the opportunity. For additional help, click [here](#).
- 3. Update an Existing Opportunity**
To edit an existing volunteer opportunity, click on the "Volunteer Opportunities" tab above. **If you're changing the date and/or loc**
- 4. Manage Your Volunteers**

HandsOn Connect Shortcuts

Volunteer Opportunity Wizard

Create New...

Quick Links

- [Connections Pending Approval](#)
- [Self Reported Hours](#)

Approve Pending Volunteers

Access your **Occurrence Records** through one of the following:

- The Quick Links Connections Pending Approval link > Select the Occurrence
- The Volunteer Opportunities Tab > Select the opportunity and then scroll down to the Occurrence ID
- The Occurrence Tab > Select the Occurrence

Once in the Occurrence record, you can scroll down and view all of the volunteers who have signed up for the opportunity or shift, print check-in sheets, and report attendance. The Connections Grid on this screen will also allow you to mass email volunteers and report attendance.

Connections

Confirmed Volunteers

Waitlisted Volunteers

Pending Volunteers

Declined Volunteers

Email Volunteers

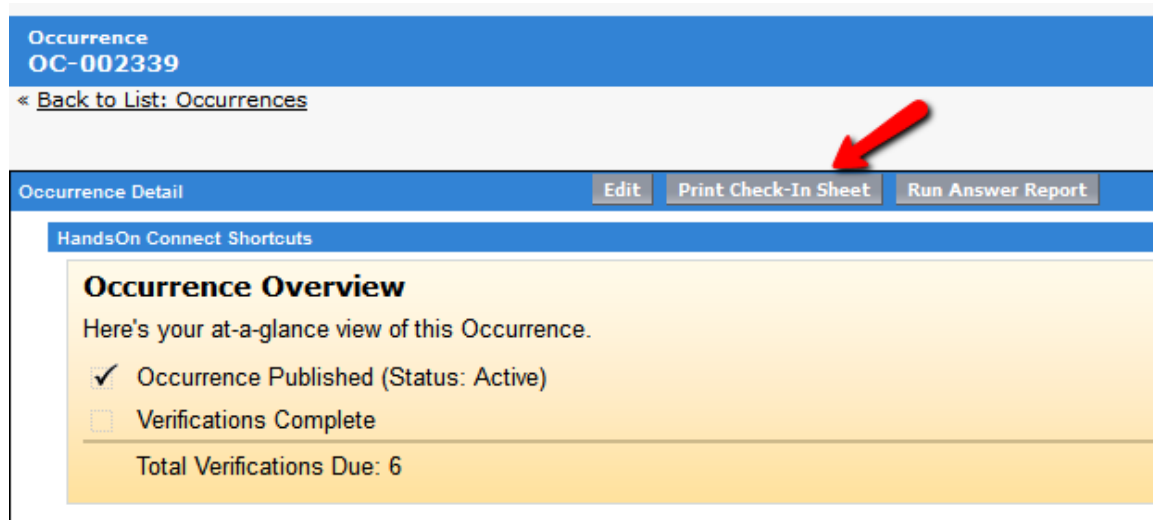
Mark Confirmed

Mark Declined

	First Name	Last Name	Role	Team Name	Status	Attendance Status
<input type="checkbox"/>	Kevin	Bacon	(V)		Pending Approval	
<input type="checkbox"/>	Kyle	Chandler	(V)		Pending Approval	

Print a Check-In Sheet

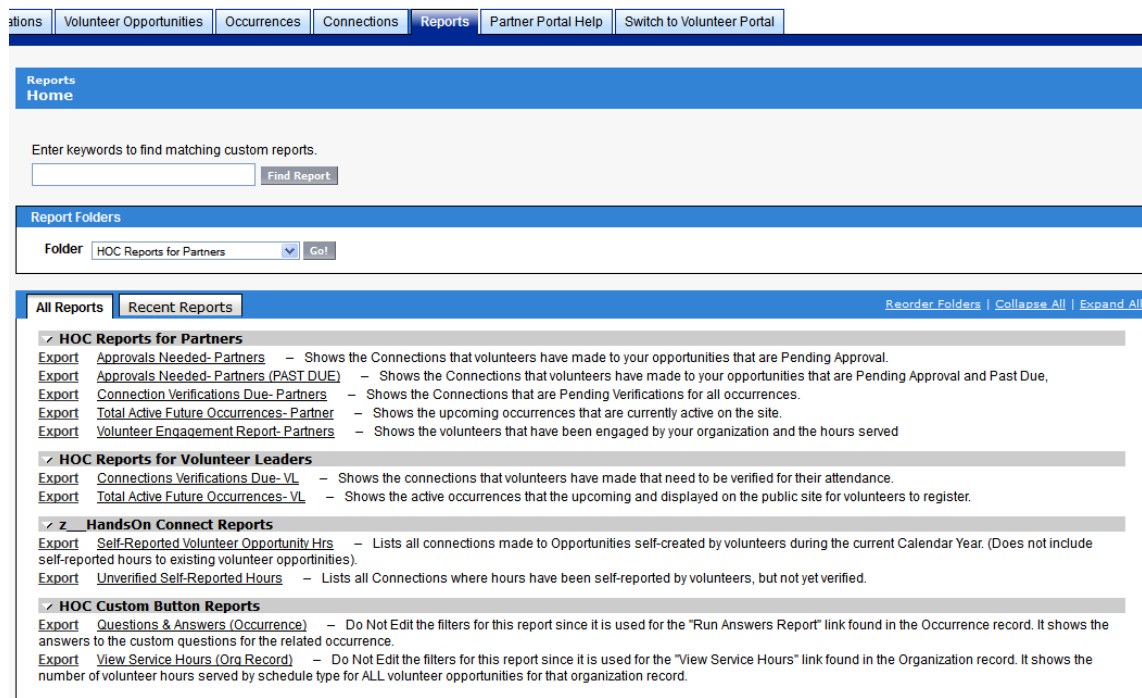
In the Occurrence record, you can click on the “Print Check-In Sheet” button to print out a sign in sheet for all approved volunteers.



The screenshot shows the 'Occurrence' record for 'OC-002339'. At the top, there is a blue header with the text 'Occurrence OC-002339' and a link 'Back to List: Occurrences'. Below this is a navigation bar with buttons for 'Edit', 'Print Check-In Sheet', and 'Run Answer Report'. A red arrow points to the 'Print Check-In Sheet' button. Below the navigation bar is a section titled 'HandsOn Connect Shortcuts' with a yellow background. It contains an 'Occurrence Overview' section with the text 'Here's your at-a-glance view of this Occurrence.' and two status items: 'Occurrence Published (Status: Active)' with a checkmark and 'Verifications Complete' with a checkbox. At the bottom of this section, it says 'Total Verifications Due: 6'.

View, Download or Print a Report

- Click on the Reports tab to select a report to preview or download



The screenshot shows the 'Reports' page. At the top, there is a navigation bar with tabs for 'Occurrences', 'Connections', 'Reports', 'Partner Portal Help', and 'Switch to Volunteer Portal'. Below this is a section titled 'Reports Home' with a search bar and a 'Find Report' button. Below the search bar is a 'Report Folders' section with a dropdown menu for 'Folder' set to 'HOC Reports for Partners' and a 'Go!' button. Below this is a list of reports under the 'All Reports' tab. The reports are organized into categories: 'HOC Reports for Partners', 'HOC Reports for Volunteer Leaders', 'HandsOn Connect Reports', and 'HOC Custom Button Reports'. Each category has a list of reports with links to 'Export' and a brief description of the report's content.

Switching between the Partner Portal and the Public website (aka. the “Volunteer Portal”)

To access the public side of the website, simply click on the “**Switch to Volunteer Portal**” tab, and the system will take you to the public website. You can visit the public website to see how your volunteer opportunities and account information look to volunteers. Please note, however, that your volunteer opportunities will not show up on the website until they have been approved by Volunteer Network staff.



From the public website, you can access the volunteer leader portal by clicking on the “**Return to Organization Portal**” link in the upper right-hand corner below the “Logout” button.



For more even more help and searchable topics listings about using the Partner Portal, log in to partners.handsonconnect.org.

Quick Reference Sheet

Enter Your Opportunity Online (in HandsOn Connect)

www.BloomingtonVolunteerNetwork.org

****IMPORTANT REMINDERS** - these can be confusing terms when entering your opportunity:

OPPORTUNITY TYPE → Volunteer Opportunity or Training or Orientation

SCHEDULE TYPE → Date & Time Specific = Calendared event ('done in a day' opportunity),
Ongoing Recruitment = Not on the calendar

REGISTRATION TYPE → Sign Up = volunteer is automatically confirmed,
Express Interest = volunteer will contact you to be scheduled

Log in to your Partner Account

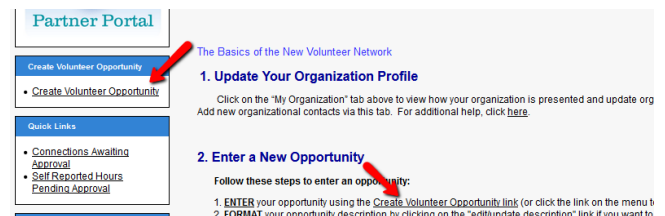
- Use your email as your username



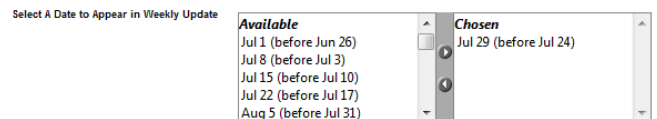
3 Steps to Entering a New Opportunity:

1. ENTER your opportunity using the [Create Volunteer Opportunity Link](#)

You will need the title, description, contact, location, and date and time of your opportunity.



2. ADD a date to feature your opportunity in the Volunteer Bloomington Weekly Media Blast. It is best to select a date that is 2-5 weeks before your event or recruitment needs.



3. FORMAT your opportunity description to include text links, formatting, and photos if needed. IMPORTANT: Refresh the page after adding or editing your description.

